

CERTIFIED NURSING ASSISTANTS in SAN FRANCISCO BAY REGION



Healthcare is one of the largest employers in California, providing a wide range of well-paying career opportunities for residents. In 2014, the Centers of Excellence partnered with the Health Workforce Initiative (HWI) and the California Hospital Association (CHA) on two healthcare surveys to **assess workforce needs** at both state and regional levels. The surveys targeted three healthcare sectors:

- **Hospitals** provide medical, diagnostic, and treatment services to inpatients and some outpatient services.
- **Ambulatory Healthcare Services** provide healthcare services to outpatients in settings such as offices of physicians, outpatient care centers, and clinics.
- **Nursing and Residential Care Facilities** provide residential care combined with either skilled nursing, long-term, transitional care, or other types of care as needed.

Statewide, 190 hospitals responded to the hospital survey and 1,600 clinics, labs and facilities responded to the ambulatory and residential care survey, providing an excellent sample to analyze healthcare workforce demand across the state and in several regions. The research focused on identifying: (1) labor market demand for key occupations in healthcare industries, (2) training supply supporting healthcare industries, and (3) key issues impacting supply and demand.

This report is one in a series of reports profiling healthcare occupations in the San Francisco Bay region.¹ There are ten occupational profiles in the series: registered nurses, certified nursing assistants, licensed vocational nurses, medical assistants, medical coders, physician’s assistants, healthcare social workers, medical laboratory technicians, occupational therapy assistants and home health aides (HHAs).

Labor Market Demand

In the San Francisco Bay region, there are approximately 27,000 certified nursing assistant jobs in the **ambulatory and residential care** subsectors. Over a 12 month period (Apr 2014 to Mar 2015), employers in these subsectors will need to fill nearly 11,200 openings created by new job growth and replacement needs. CHA members that responded to the survey employ approximately 900 certified nursing assistants. This sample does not include an estimate of total **hospital** employment because only 41% of hospitals in the region participated in the survey.

Projected Employment for Certified Nursing Assistants (CNAs)²

Ambulatory & Residential Care Industries (n=85)	Current Employment (2014)	12-Month Growth	Replacement Jobs	Total Openings (Growth + Replacements)
	23,251	3,803	7,380	11,182

Current Employment for Certified Nursing Assistants

Hospitals (n=34)	Current Employment*	Full-time Positions	Part-time Positions	Per Diem Jobs
	906	433	473	132

*Ending headcount for the 4th quarter of 2013.

Labor Market Trends

Ambulatory & Residential Care

→ The number of CNAs in the region is expected to grow by 16%.

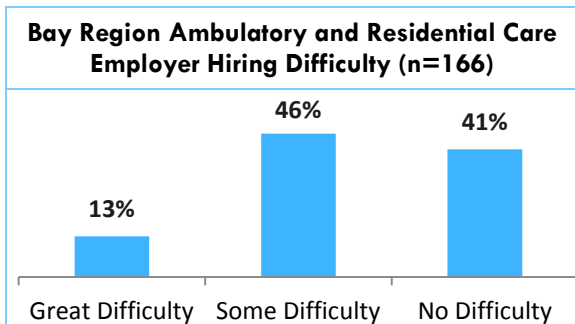
Hospitals

→ 52% of CNAs employed by regional hospitals work part-time.

¹The Bay region includes the following 12 counties: Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, and Sonoma counties.
² Ambulatory and residential care and hospital employment counts include full-time and part-time employment. Additional data on per diem employment for hospitals is totaled separately.

Difficulty Hiring

59% of the employers in the Bay region **ambulatory and residential care** subsectors reported difficulty finding qualified applicants for entry-level certified nursing assistant positions. However, only 9% of **hospitals** statewide are reporting difficulty finding qualified applicants for entry-level positions. Minimum qualifications include CNA state certification, interpersonal communication and customer service skills.



Training Supply

According to the California Department of Public Health, there are 77 approved CNA programs in the SF Bay region.³ However, completion data is only available for Mission College (most likely due to CNA low-unit certificate completions not being submitted to CCCCCO Data Mart). In addition to the one community college, only one other institute, WestMed College, reported completer data to the National Center for Education Statistics (NCES) for 2012-13.⁴

The latest California Nurse Aide Performance Summary report is available for the two year period 10/01/12 – 09/30/14.⁵ The report shows that 43 of the 77 approved programs (56% of total) have students taking the exam in this period. CNA students need to pass both the written and skills exams in order to be certified. Pass rates are reported separately for each of the two exam components: skills (38 programs reported) and written (36 programs). The results and educational institutions are shown below.

	Community Colleges	Other Pubic	Private	2 Year Total	Annual Average
Skills Passed	245	118	1,266	1,629	815
Skills Pass Rate	87%	77%	87%	86%	86%
Written Passed	181	115	1,152	1,448	724
Written Pass Rate	94%	89%	79%	82%	82%

Note: This data does NOT include American Red Cross exam results.

CNA Programs: SF Bay Region

CA Community Colleges (8)

City College of San Francisco*
 College of San Mateo*
 Contra Costa College
 Evergreen Valley
 Gavilan College
 Mission College
 Solano College*
 Santa Rosa Junior College

Private Education Institutions (38)

Advanced Medical School of Nursing:
 Bay Point/ Pittsburg
 Advanced Pro Nursing Institute, Hayward
 American Care Quest, San Francisco
 American Red Cross, Santa Rosa
 ARC – Bay Area Chapter, San Rafael

Arriba Juntos, San Francisco
 Bay Area College of Nursing: Daly City / Palo Alto
 CA Nurses & Vocational Institute, SF
 Castro Valley Adult School
 Centerpointe Learning Institute, Daly City
 Central Coast College, Salinas
 Facets of Nursing, South SF
 Jessie K DiCarlo Center, Daly City**
 Medical Career College, Fremont
 Mission Trails ROP: Salinas & Soledad
 Napa State Hospital
 Niles College, Burlingame
 NCP Vocational School, Hayward
 Northbay Nursing Institute, Fairfield

No. CA Nursing Academy, Daly City
 No. CA Vocational College, Milpitas
 Nurse Builders Academy, Santa Clara
 Pass Institute: Pleasanton/ Pleasant Hill
 Presto Vocational Institute, Los Altos
 Providence Vocational School, Daly City
 Quest Nursing Educ. Center, Oakland
 San Leandro Adult School
 Scrubmed, Antioch
 Silicon Valley School of Nursing, SJ
 Solano School of Nursing, Milpitas
 South Bay School of Nursing, San Jose
 St. Paul's Tower, Oakland**
 TLC's Institute of Nursing Ed., Salinas
 VIP Nursing School Inc., San Leandro

* No students from these three community colleges took the exam during this period, but they do have CNA programs

**College is not on the approved CA Department of Public Health list

³ <http://www.cdph.ca.gov/services/training/Documents/CNATrainingPrograms.pdf>

⁴ Higher education institutions are required to report completion data to NCES if they participate in any federal financial assistance program authorized by Title IV of the Higher Education Act.

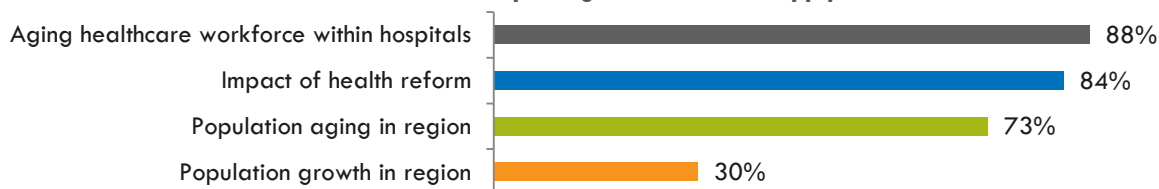
⁵ The California State Nurse Aide Program performance summary 10/01/12 - 09/30/14 was provided by Pearson VUE.

Supply Challenges

The healthcare sector is facing a variety of factors that may have a direct impact on the workforce supply. Across California, the majority of hospitals are concerned that health reform, the aging hospital workforce, and the aging population will have a significant impact on the state's ability to keep up with healthcare workforce demand. Healthcare reform is expanding coverage to thousands of previously uninsured residents, which is increasing demand for healthcare services across the board. According to hospitals participating in the survey, the aging population will expand demand for certain types of services, creating additional need for skilled workers.

While healthcare reform and the aging population will increase demand for new healthcare workers, the aging healthcare workforce within hospitals also creates a need for replacement workers. In the hospital setting, this is not a critical issue in the certified nursing assistant workforce. **58%** of certified nursing assistants employed by hospitals fall within the **age cohort of 25 to 45** indicating that there is a sufficient pipeline of young workers entering the certified nursing assistant field (from the statewide totals in the hospital survey responses).

**Percent of Hospitals Concerned
Over Factors Impacting the Workforce Supply**



Employer Perspective

61% of **ambulatory and residential care** facilities provide professional development (either in-house or sponsored training) for their existing CNAs. Some of the training topics include: continuing education units to renew certifications, dementia, fall prevention and transfer techniques, activities of daily living (ADL), medication training, policies and procedures, ethics and customer service. Ambulatory and residential care employers suggested topics that community colleges could offer or improve upon to support professional development for their existing staff. The following suggestions were offered:

Sidebar Discussion: Strong Demand

CNAs and HHAs are both providing home healthcare services in **Ambulatory and Residential Care** facilities. In the Bay region, there is strong demand for both occupations as shown by:

- Total combined openings (new growth + replacements) estimated at over 17,300
- Surveyed employers indicated that it is the most difficult to find entry-level qualified applicants for these two related occupations, out of all ten healthcare occupations in the survey.

It appears that the community colleges could be better positioned to meet this demand:

- For both CNAs and HHAs, surveyed employers indicated instruction in home healthcare and activities of daily living (ADL) as areas for community college improvement
- Community college students represent only 14% of all students passing the Certified Nurse aide exam.
- There are eight community colleges with CNA programs. Three of the seven community colleges with HHA programs awarded only 88 certificates and noncredit awards annually on average 2010-13.

Offer

- Training and experience with patient care related to dementia, Alzheimer's and hospice
- Training on all services provided in home health settings
- Develop electronic medical records and HIPPA training for the CNA

Improve

- Integrate more communication, time management, teamwork, work ethics and customer service skills into staff training
- Training on proper documentation, charting and understanding the importance of accuracy and consequences of subpar work
- Training on conducting proper transfer procedures
- Integrate more hands-on experience in a clinical setting into curriculum

In Summary

Key issues affecting supply and demand for certified nursing assistants include:

- In the Bay region, nearly 60% of the **ambulatory and residential care** employers surveyed reported difficulty finding qualified applicants for entry-level CNA positions. However, **hospitals** statewide reported not having difficulty finding qualified CNAs.
- In the Bay region, there are eight community colleges offering CNA Programs; 25 other public institutions, and 45 private institutions. However, in most cases completion of CNA degrees or certificates is not being reported to the California Community College Chancellor's Office or NCES.
- To estimate supply, the numbers of students taking and passing the written and skills components of the California Nurse Aide exams are available. In the Bay region, the annual average is 815 passing the skills exam, 724 passing the written exam. Students from only 56% of the approved CNA programs by the CA Department of Public Health took the exam during the two year period reported.
- Students from community colleges only represent 14% of the students passing the written and skills exams annually. Most of the students are from private institutions accounting for 79% of the total passing the exams.
- The pass rate of 94% for community college students on the **written** exam is significantly higher by 15% over private educational institutions, and the **skills** exam pass rate is the same as the pass rate of private educational institutes at 87% and above other public institutes at 77%.
- 58% of certified nursing assistants in the statewide hospital setting fall in the age cohort of 25 to 45, indicating there is a sufficient pipeline of young workers entering the CNA field.

In the short-term ambulatory and residential care employers surveyed suggested that community colleges should augment their programs for existing CNAs by offering more hands-on experience in a clinical setting, training related to quality patient care for dementia and Alzheimer's patients and for all facets of patient care in the home healthcare setting to meet the strong demand. Employers would also overwhelmingly like to see community college students coming out of CNA programs with better communication, team work and customer service skills.

For More information

This document and others are available to download at www.coecc.net/health. For more information, contact:

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More about the Health Workforce Initiative: The HWI provides education and training programs to meet emerging demands for healthcare industry workers; to determine needs, facilitate development of innovative solutions and to locate resources to implement planned responses; to evaluate and initialize health-related educational programs. More information about the Health Workforce Initiative is available at www.ca-hwi.org.



More about the Centers of Excellence: The Centers of Excellence (COE), in partnership with business and industry, deliver regional workforce research customized for community college decision making and resource development. This information has proven valuable to colleges in beginning, revising, or updating economic development and Career Technical Education (CTE) programs, strengthening grant applications, assisting in the accreditation process, and in supporting strategic planning efforts. More information about the Centers of Excellence is available at www.coecc.net.

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